

Preparing for a visit to your solicitor

This is a form that will help you make your will. By completing as much of the form as you can before visiting your solicitor, you will ensure that you have the information required by the solicitor. Try to include the full names and addresses wherever possible. If you have previously made a Will, please take it along with you when you visit the solicitor.

Note: this form cannot be a valid will. It is only to help you in will-making

1. Your details

Your name _____

Your address _____

Post code _____

Tel No _____

2. Value your assets

Your assets or what you own

Your liabilities or what you owe

	<u>Value in £s</u>
Your home	£ _____
Additional property or land	£ _____
Home contents (include furniture & fittings, electrical goods etc)	£ _____
Cars & other vehicles	£ _____
Items of individual value (include jewellery, art, antiques, cameras etc)	£ _____
Savings in banks and building societies	£ _____
Insurance & pensions	£ _____
Shares & investments	£ _____
National Savings, Premium bonds etc.	£ _____
Other assets	£ _____
Total assets	£ _____

	<u>Value in £s</u>
Your mortgage	£ _____
Overdrafts and loans	£ _____
Credit or HP agreements	£ _____
Other	£ _____
Total liabilities	£ _____
Total Assets less liabilities: (this is the estimated value of your estate at the present time)	£ _____

3. Gifts of money

Please list any set sums of money you may wish to leave to people and/or charities. These are called *pecuniary legacies*. (Alternatively you may wish to leave the residue of your estate, or a proportion of it to a charity, once you have made provision for your family and friends. Please see section 5 to do this.)

Beneficiaries details

Amount

Name		
Address	Tel No	
Post code		
Name		
Address	Tel No	
Post code		
Name		
Address		
Post code	Tel No	

4. Specific items

List any specific items that you wish to leave to people and/or charities. These gifts are called *specific legacies*.

Beneficiaries

Name	Item
Description of item	
Address	
Postcode	Telephone No
Name	Item
Description of item	
Address	
Postcode	
Name	Item
Description of item	
Address	
Postcode	

7. Your executors

These should be the people who you would like to be responsible for ensuring that your wishes are carried out. It is usual to select two people, although you can have up to four. Ensure that at least one of your executors is likely to survive you. It is possible to make your solicitor one of your Executors. However, there will be a charge for this service.

Executors

Name

Address

Postcode

Tel No

Name

Address

Postcode

Tel No

Name

Address

Postcode

Tel No

8. Do you have young children?

If you do it is advisable to appoint someone to act as their guardian, in case you die before they are 18 years old.

Guardian

Name

Address

Postcode

Tel

9. Do you have any questions you would like to ask your solicitor?
